4 customer success playbooks

To use these templates:

- 1. Download the PDF
- 2. Select only the page(s) you need
- 3. Click on the fields and fill in the text as needed
- 4. Save your document and share it with your team





Customer success playbooks

This collection of customer success playbooks will provide you with a comprehensive set of templates, each tailored to address specific facets of the customer journey. From onboarding and product feedback to low engagement and upselling to quarterly reviews and health score assessments, these playbooks offer actionable insights and structured guidelines to ensure you're always a step ahead.

Each template is prefilled with example text based on industry best practices yet offers the flexibility to fully customize it to your unique business needs. Dive in and equip your customer success team with the tools to drive unparalleled customer satisfaction and business growth.

Table of contents

Customer onboarding

3

- Customer product feedback
- Low engagement
- **Customer upsell**

CUSTOMER SUCCESS PLAYBOOKS

2

Customer onboarding playbook

Overview

This playbook aims to help new customers understand the value they'll get from our partnership.

Ŭ	customer base stomers is this playbook targeting?)	Objectives (Add or replace objectives to and customer goals.)
Roles	(Identify which teams will lead this effort	and which teams will support it.)

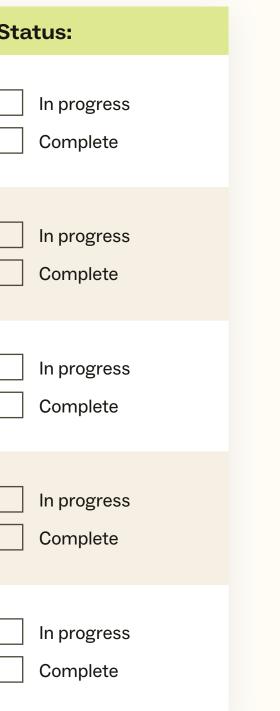
Success team	Sales team	Cu
Resources	(Add relevant resource links to this playbook.)	

Email templates:	1
	Email templates:

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Internal documents:



2 Customer product feedback

Overview

This playbook aims to gather constructive feedback to improve product performance and the customer experience.

Target customer base (Summarize your target customer base.)		Objective (Add or replace company goa	ce existii
Roles (Identify which teams	will lead this effort	and which teams	will supp
Success team	Sales team		Cus

Resources (Add relevant resource links to this playbook.)

Call scripts:	Email templates:	S

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Surveys:

PS: (Customize steps to match company processes.) Tasks: (Customize tasks to match company processes)	s) St

Sta	tus:	
	In progress Complete	

3 Low engagement playbook

Overview

This playbook aims to identify customers with low product usage to prevent future churn.

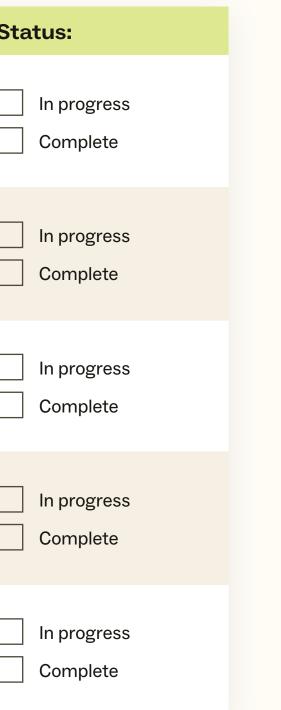
Target customer base (Summarize your target customer		Objective (Add or replace company goa	ce exist
Roles (Identify which teams	will lead this effort	and which teams	will sun
Success team	Sales team		Cu
Resources (Add relevant resource links to this playbook.)			
Call scripts:	Email templa	ates:	Inte

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4 Customer upsell playbook

Overview

This playbook aims to identify opportunities with existing customer accounts to upgrade plans.

Target customer base (Summarize your target customer base.)		Objectives (Add or replace existing company goals.)			
Roles (Identify which teams	Roles (Identify which teams will lead this effort and which teams will supp				
Success team	Sales team		Cus		
Resources (Add relevant r	resource links to th	is playbook.)			
Call scripts:	Email templa	ates:	Inte		

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Internal documents:

